WHAT IS CORNNATURALLY AND HOW IS IT ASSOCIATED WITH THE SWEETENER360?

In the digital age, food and beverage manufacturers are continually on the defensive as consumers are bombarded with a flood of misinformation about the impact of specific food ingredients on health and wellness.

The Corn Refiners Association created CornNaturally to provide food and beverage professionals with fact-based information from credible third-party sources regarding high fructose corn syrup (HFCS), so they can make fully informed decisions for their company, brand and products. Resources include content related to sweetener science, economics and consumer research.

The cornerstone of CornNaturally’s consumer research is the Sweetener360, a custom research study completed in part by Mintel and Nielsen Consulting.
The Second installment of a Yearly Study on Ingredient Avoidance.

Resulting in an unprecedented segmentation analysis, the 2015 Sweetener360 study brought together attitudinal research and shopper data for more than 15,000 consumers. For the second year in a row, the data indicates that food and beverage manufacturers should focus on actual purchase data for each of their consumer segments in order to deliver against true consumer demand.

Why Study Sweetener Attitudes and Behaviors?
The original Sweetener360 was developed in 2014 to help food and beverage (F&B) manufacturers make informed product formulation and marketing choices based on a complete picture of their consumers. The goal was to analyze consumer attitudes toward sweeteners and how that impacts their purchase behavior. In 2015, the updated Sweetener360 analyzed data from more consumers about more ingredients. The 2015 study revisited the six distinct consumer segments identified in 2014 and reaffirmed that consumers continue to say one thing and do another when it comes to sweeteners. Specifically, the new data showed the following:

- Consumers are becoming more mindful of sweeteners and health, but purchase behavior isn’t changing.
- Millennials’ attitudes on health and wellness don’t translate into purchase behaviors.
- Traditional and social media impacts the attitudes of health-conscious consumers, but not their behavior.
- Consumers care more about taste and price than better-for-you claims and are more concerned about total sugars than specific types.

Methodology

In September 2014, Nielsen Homescan fielded and received 15,552 15-minute consumer surveys from self-identified “primary household shoppers.”

Mintel Consulting applied the same “Sweetener360 Segmentation” methodology that was created for the 2013 report, revealing six distinct demographic lifestyle segments of sweetener consumers.

The 2015 Sweetener360 Segmentation combined the actual purchase behavior of these 15,552 Nielsen Homescan panelists with their consumer survey responses regarding 15 high-volume F&B categories.
CONSUMERS ARE BECOMING MORE MINDFUL OF SWEETENERS AND HEALTH, BUT THEIR PURCHASE BEHAVIOR ISN’T CHANGING.

Shifts in attitudes indicate consumers are becoming more concerned about health and wellness, but research shows those attitudes aren’t reflected in what they buy.

So, what’s shifting? Overall, the number of consumers who say they avoid total sugars has increased since 2014 (from 21 to 25.4 percent). In addition, the consumer segment with the most mindful attitudes toward health and wellness (Julia) has grown from 15 to 19 percent and is now the largest of the six defined consumer segments.

Regardless of this shift in what consumers say about health and wellness, each segment continues to buy its share of products formulated with all types of sweeteners. For example, while Julia says she’s avoiding specific sweeteners including high fructose corn syrup (HFCS), she buys nearly her fair share of HFCS-formulated products.

The conclusion? Despite an increase in mindfulness around health and wellness, consumer behavior hasn’t changed. All consumer segments were found to be strong contributors to sales of products with sugar, HFCS and low-/no-calorie sweeteners regardless of what they say they purchase or avoid purchasing.

Sales are nationally projected totals, based on Nielsen Homescan panel projections from the purchases of 11,389 panelists during May 27, 2012, through May 25, 2013.

JULIA REPRESENTS 19 PERCENT OF THE TOTAL POPULATION, AND SHE BUYS 17 PERCENT OF HFCS-FORMULATED PRODUCTS.
MILLENNIALS’ ATTITUDES ON HEALTH AND WELLNESS DON’T TRANSLATE INTO PURCHASE BEHAVIOR.

More than any other age group, millennials claim that it’s worth the sacrifice to pay more for food and beverages with sweetener ingredients that they perceive as better for them. In fact, 46 percent of millennials surveyed agreed with this claim. However, millennials are actually purchasing products formulated with all types of sweeteners and are purchasing more than their fair share of HFCS- and sugar-sweetened products.

The conclusion? The data debunks the common perception that millennials are avoiding specific food ingredients including HFCS. In fact, millennials are shown to be strong contributors to HFCS- and sugar-sweetened products.

TRADITIONAL AND SOCIAL MEDIA IMPACTS THE ATTITUDES OF HEALTH-CONSCIOUS CONSUMERS, BUT NOT THEIR BEHAVIOR.

Buzz from social media and consumer news may impact consumer attitudes, but the fact of the matter is that behaviors aren’t affected. For instance, the two segments most likely to stay on top of sweetener news (Stacey and Julia) are also the most likely to say they avoid specific sweeteners like HFCS. But despite their attitudes, both segments buy nearly their fair share of products formulated with HFCS.

The conclusion? The study confirms that sweetener news shared via traditional and social media impacts consumers’ sentiments toward certain ingredients, but doesn’t change what they buy.
NEW FINDINGS VALIDATE TASTE, PRICE AND TOTAL SUGARS AS MOST IMPORTANT TO CONSUMERS.

Key findings from the 2014 Sweetener360 research were validated in the 2015 study—specifically, that consumers are more concerned about total sugars than specific types and that they value taste and price over better-for-you claims.

Overall, more than four (4.3) times as many consumers expressed concern for total sugars compared to HFCS in 2015. In the consumer segment claiming to be the most “health-conscious” (Stacey), nearly five (4.7) times as many consumers expressed more concern for total sugars than HFCS.

When it comes to top purchase drivers, five out of the six consumer segments say taste is most important. Four out of the six segments rank price as their second-most important driver.

Visit CornNaturally.com/Sweetener-360 for more content related to the 2015 Sweetener360.

The information included in this fact sheet is derived from the 2015 Sweetener360, a custom research study commissioned by the Corn Refiners Association and completed in part by Nielsen and Mintel Consulting.